

## REQUEST FOR PROPOSALS

DATE OF ISSUE: November 29, 2016

TO: Potential Providers of Services

RE: Request for Proposals for National Register of Historic Places

Nomination for Southfield, Michigan

## I. Services Sought by Authority

The Michigan State Housing Development Authority, State Historic Preservation Office ("Authority" or "SHPO") is seeking an organization authorized to do business in Michigan to provide the Authority with a National Register of Historic Places ("NRHP") nomination for two Mid-Century Modern residential neighborhoods in Southfield, Michigan. A detailed description of the work is described in the Overview of services sought, tasks and activities of this Request for Proposals ("RFP").

Michigan law allows for veterans preference only; however, women-owned, minority-owned, and small businesses authorized to conduct business in the State of Michigan are encouraged to register with Buy4Michigan and submit proposals.

## II. Contents of this RFP

- Overview of services sought, tasks and activities ("Scope of Work" or "SOW")
- Exhibit A Notices to Bidders
- Exhibit B Proposal Submission
- Exhibit C Proposal Format
- Exhibit D Project Personnel Form

#### III. Overview

The SHPO has been documenting Michigan's Modern resources since 2008 as part of the Michigan Modern project (michiganmodern.gov). Through our work, staff recognized that Michigan's twentieth century resources are under-documented and underappreciated. The SHPO goal is to bring awareness to the significance of these resources and encourage their protection and preservation. To date, the focus of the Michigan Modern project has been on identifying high style resources and telling the outstanding story of the state's internationally acclaimed architects and designers such as Eero Saarinen, Minoru Yamasaki, Charles Eames and Florence Knoll. This is the first effort to document mid-range residential housing from the

period. This project will serve as a prototype that can be applied to other mid-century neighborhoods across Michigan.

The Authority seeks consulting services to undertake intensive level historic resource surveys of two Mid-Century Modern residential neighborhoods in Southfield, Michigan: Northland Gardens (1956) and Plumbrooke Estates (1960) and write National Register of Historic Places ("NRHP") nominations for each location.

## IV. Objectives, Tasks & Activities

- **A. General Objectives.** To successfully perform the services described in Section I above, the Bidder must satisfy the following objectives:
  - 1. Undertake an intensive level historic resource survey and prepare the NRHP nomination materials using the newest version NPS Form 10-900 template available from the National Park Service, in accordance with (a) the National Register Bulletin How to Complete the National Register Registration Form and (b) the SHPO's Manual for Historic and Architectural Surveys in Michigan.
  - 2. Complete a historic resource survey report and prepare NRHP nomination materials for historic districts in two Mid-Century Modern residential neighborhoods located in Southfield, Michigan. The potential historic districts include approximately 200 buildings total. The preliminary boundaries for Plumbrooke Estates are a series of cul de sacs along Plumbrooke Drive between Nine Mile Road and the Rouge River to the north of McClung Avenue. The preliminary boundaries for Northland Gardens are Westland Avenue, Westhampton Road and Southfield Road. Plat maps of the project areas are available on the Department of Licensing and Regulatory Affairs (LARA) Statewide Subdivision Search site at http://www.dleg.state.mi.us/platmaps/dt\_image.asp.
- **B. Tasks & Activities.** The selected contractor shall perform objectives including but not limited to the following:
  - 1. Initial On-site Meeting. Meet with the SHPO National Register Coordinator, Preservation Planner, a representative from the City of Southfield, to discuss the preliminary Project Areas, sources for research materials, and other topics as needed. This meeting shall be held in the City of Southfield.
  - 2. Consult with the Local Community. Coordinate and consult with the City of Southfield's primary contact and local historians (to be determined) as necessary to complete the activities described in this Section, including but not limited to an informational meeting at the beginning of the project and presenting the NRHP nomination to the local community at the end of the project, reviewing the Project Area boundaries, and reviewing drafts of the NRHP nomination. Note, however, that the selected contractor alone shall be responsible for the successful completion of all products.
  - 3. Conduct primary and secondary research and write historic context statements for the overall post World War II development of the City of Southfield and the overall development of the Plumbrooke Estates and Northland Gardens neighborhoods. Research must include a variety of source materials as listed in the Historical Research section of the SHPO's Manual for Historic and Architectural Surveys in Michigan.

4. Survey. All surveys must be done in accordance with the SHPO's Manual for Historic and Architectural Surveys in Michigan. For each resource, the selected contractor will provide a completed survey inventory form in Microsoft Excel or a software approved in advance and in writing by the SHPO. The survey shall include thorough photo-documentation of resource exteriors and compiling descriptive information adequate for the inventory entries in the nomination's description section. (Note: Fields used in the inventory form shall follow the general format of NRHP nomination Form 10-900. A field for the resource's GIS coordinates should be included directly following the Historic and Other Names Fields. As an option, an ArcGIS file that includes a shapefile with point data may be submitted.)

For each resource, the selected contractor will provide the following:

- a. Photography. For each of the approximately 200 buildings, photograph at least two views that show the front and one side and the front and other side. For resources on a corner site or freestanding, also include one or more three-quarter views showing both the front and each side of the resource and a general view of each side of the resource. For garages and small outbuildings, provide one view each. For larger outbuildings such as carriage houses, provide two views from different directions whenever possible. Images must be in color, saved in JPEG format, and meet the National Register's preferred standard of six megapixels (2000 X 3000 pixel image). Image files shall be named according to the following protocol and not include the state or the county name: Street name\_Street direction (N, S, E, W)\_Address number (Use 4 digits, 0001 etc.)\_Image number (01 etc.), if there are multiple images for same property. Example: the file name for the first of several images for 23 West Smith Street Should Appear as SmithStreet\_W\_0023\_01.
- **b.** Resource Description. Short description summary for each surveyed resource that includes, at a minimum, architectural style, significant features and materials, property type, and year built.
- **c.** GIS Coordinates. For each surveyed resource, record its geographic coordinates, parsed into decimal degrees.
- **d.** Eligibility Determinations. For each resource, include a determination of contributing or non-contributing based on the Secretary of the Interior's Standards for listing in the NRHP found in *National Register Bulletin: How to Apply the National Register of Historic Places Criteria for Evaluation.*
- **e.** History and Significance. A short history of each individual resource that addresses the significant people and events associated with the resource.

The selected contractor will compile all information into a Survey Report that includes the following:

- **a.** Historic context statements for the City of Southfield and for the Plumbrooke Estates and Northland Gardens districts.
- **b.** An inventory form for each individual resource.

- **c.** Maps with district boundaries clearly delineated.
- **d.** Microsoft Excel list of the individual resources by street name, address and direction that includes the architectural style, year built, and eligibility determination.
- **e.** Bibliography in an accepted standard format, such as the *Chicago Manual of Style*.
- 5. NRHP Nominations. Prepare a complete set of NRHP nomination materials for the Southfield Plumbrooke Estates and Northland Gardens neighborhoods. Prepare all sections of the district NRHP nomination in accordance with the contents and format requirements provided by the National Register Bulletin: How to Complete the National Register Registration Form.
  - **a.** The NRHP nomination shall be submitted at three intervals including first draft of specific sections (75% completion), second draft of all sections (95% completion), and the final NRHP nomination (100% completion). All Reviewer comments must be addressed in the report.
- 6. GIS Survey. Prepare a Microsoft Excel spreadsheet that includes parcel numbers, property names, property addresses, district name, "C" or "NC" (to indicate whether the property in question is either a contributing or noncontributing resource within the district), and geographic coordinates parsed into decimal degrees. As an option, the selected contractor may also submit an ArcGIS file that includes a shapefile with point data or polygon data with attribute tables that include the district name, city, and county.

#### 7. Deliverable #1.

- a. Prepare and submit a first draft of <u>specific</u> sections of the Southfield Plumbrooke Estates and Northland Gardens neighborhoods NRHP nomination (75% completion) on NPS Form 10-900 stored on CD. Deliverable #1 must also be sent to the City of Southfield for review and comment. Deliverable #1 must include:
  - i. Boundary Recommendation and Map. Recommend to the Authority specific final district boundaries, along with a rationale in writing, for the selected boundaries. Include a district map or series of maps illustrating the recommended boundaries.
  - ii. Description Statement and Inventory. The description statement shall include an overview description of the district and an inventory of all resources as outlined in the SHPO's *Manual for Historic and Architectural Surveys in Michigan*. The overview description shall provide general descriptive information on the district, including but not limited to the general character, size and form, topography, street plan, etc. The inventory entries shall follow the four-part format of: (i) identification, (ii) building description, (iii) history, and (iv) bibliography. The history portion presented in each inventory entry shall include, at a minimum, information resulting from review of the Sanborn fire insurance

maps, and any other maps, and from any available directories. Directory research for the downtown buildings shall focus on identifying early and long-time occupants and uses. Any directory research for the residential properties should focus on the earliest entry for the property. A bibliography should be provided when information specific to that property is located beyond the general map and directory sources used for all properties, such as newspaper references.

- iii. Survey Images. Provide color images (stored in .jpeg format on CD) of all buildings and other resources within the final boundaries of the district. Building images shall include as many views of each building's facades and details as necessary to clearly document the building per the survey instructions in II, B, 4a (above) and the SHPO's Manual for Historic and architectural Surveys in Michigan.
- iv. Sanborn Maps. Provide all Sanborn maps available for the district in either paper format or stored on CD. This will aid the Authority's review of all drafts of the two NRHP nominations.
  - v. Deliverable #1 Review Meeting. Meet with Authority staff, in the local community, or at the Authority's office as agreed, after submitting Deliverable #1 to discuss broad overview comments in order to make needed adjustments such as writing style, additional research needed, order of inventories, and documenting source materials.

#### 8. Deliverable #2.

- a. Prepare and submit a first draft of all remaining sections of the Southfield Plumbrooke Estates and Northland Gardens neighborhoods NRHP nomination (95% completion), as outlined below, on NPS Form 10-900 (stored on CD) and must include:
  - i. Significance Statement. The significance statement shall include a summary paragraph of the district and a detailed statement providing a broad historical overview and documents the area's physical development and important historical themes.
  - ii. All remaining NRHP nomination sections on NPS Form 10-900 that were not already submitted as part of Deliverable #1.
- **b.** Deliverable #2 must be sent to the City of Southfield for review and comment.

#### 9. Deliverable #3.

a. Prepare and submit the final NRHP Nomination (100% completion) including all final products from Exhibit A – Scope of Work Section II, C, 1-18, in the format below:

- i. Two (2) paper printouts of the final version of the NRHP nomination form NPS Form 10-900. The NPS Form 10-900 template used shall be the newest version available from the National Park Service. The final version shall be grammatically correct and typo-free; and
- ii. One (1) CD containing the final version of the nomination form in Microsoft Word in version as agreed upon by the Authority.
- **10.** District Maps. Provide district maps as outlined below:
  - a. Two (2) sets of color printouts in 8 ½ X 11" form of maps illustrating the district's location and boundaries, as per the NRHP requirements in lieu of USGS topographical maps. The scale used in the map(s) should be similar to that used in USGS maps. The district boundaries shall be enclosed in a figure drawn with straight lines connecting a series of points (preferably no more than four (4), with the appropriate latitude and longitude for those points labeled in pencil;
  - b. Three (3) paper originals of a district map or series of maps for the Project Areas meeting the SHPO's mapping requirements as stated in the SHPO's Manual for Historic and Architectural Surveys in Michigan. The final district maps shall be printed on white archival paper only. Mylar or mylar-like materials are unacceptable. The map(s) should be 8 ½ x 11 inches in size, if possible. Map sheets larger than 11 x 17 inches are unacceptable;
  - **c.** One (1) CD containing a set of the maps required in 10a above and a set of final district maps in PDF format.
- **11.** Labeled Photographs. Provide two (2) sets of printed labeled photographs meeting the specifications set forth in the *National Register Photo Policy Factsheet* (5 x 7 inch prints are required).
  - **a.** For the Southfield Plumbrooke Estates and Northland Gardens neighborhoods NRHP nomination, provide at least twenty-five (25) different views made from color electronic images. Provide two originals of each. The photographs shall be primarily streetscape views and together provide coverage from all parts of the district.
- 12. Nomination Photograph Images. Provide three (3) CDs, listed below as CD 1, CD 2, and CD 3 containing color images to be used for the NRHP nominations. Image files shall be named according to the National Register Photo Policy Factsheet requirements. All CDs (CD 1, CD 2, and CD 3) shall contain the same color images used in making the nominations' photographic prints (see Labeled Photographs above); however, images shall be stored using different formats on each as outlined below:
  - a. CD 1: Shall contain images in .tif format and in all other respects meet the requirements set forth in the *National Register Photo Policy Factsheet* (to accompany the nomination submission to the NRHP). The digital camera resolution used must be at least two megapixels (1200 x 1600 pixel image) at 300 dpi; six megapixels (2000 x 3000 pixel

- image) at 300 dpi is preferred (these are the same standards set forth in the NRHP *Photo Policy Factsheet*).
- b. CD 2: Shall contain images in .jpeg format but in all other respects meet the requirements set forth in the *National Register Photo Policy Factsheet*. The digital camera resolution used must be at least two megapixels (1200 x 1600 pixel image) at 300 dpi; six megapixels (2000 x 3000 pixel image) at 300 dpi is preferred (these are the same standards set forth in the NRHP *Photo Policy Factsheet*).
- c. CD 3: Shall contain a Microsoft PowerPoint presentation with each image (the same images as CD 1 and CD 2) on its own individual slide. The first image of the PowerPoint presentation shall be an image of the district map with district boundaries outlined. The PowerPoint presentation will be used during the selected contractor's presentation at the Review Board meeting.
- 13. Survey Images. Provide one (1) CD or flash drive for the NRHP nomination containing color images (stored in .jpeg format) of all buildings and other resources within the final boundaries for the Project Area (See IV, B, 4a, and IV B, 7, iii, above). The digital camera resolution used must be at least two megapixels (1200 x 1600 pixel image) at 300 dpi; six megapixels (2000 x 3000 pixel image) at 300 dpi is preferred (these are the same standards set forth in the NRHP Photo Policy Factsheet for the .tif images). Image files shall be named according to the following protocol and not include the state or the county name: Street name\_Street direction (N, S, E, W)\_Address number (use 4 digits, 0001 etc.)\_Image number (01 etc.) where there are multiple images for the same property. For example, the final file name for the first of several image files for 23 West Smith Street should appear as SmithStreet\_W\_0023\_01.
- **14.** GIS Survey. Provide one (1) CD containing a Microsoft Excel spreadsheet that includes the following data columns at minimum:
  - **a.** Parcel number:
  - **b.** Property name;
  - **c.** Property address, parsed into street address/city/county/state/zip.
  - **d.** District name (where appropriate):
  - C or NC to indicate whether the property in question is either a contributing or noncontributing resource within the district (where appropriate);
  - f. Geographic coordinates, parsed into decimal degrees.

As an option, the selected contractor may also submit on the CD, along with the required Microsoft Excel spreadsheet, an ArcGIS file to aid in the Authority's development of a GIS database. The ArcGIS file should include a shapefile with point data (individual properties) with attribute tables that include required information or shapefile with polygon data (districts) with attribute tables that include the district name, city, and county. All GIS data must use the Michigan Geo Ref coordinate system.

**15.** Interested Persons List. Provide in Microsoft Excel a list of public officials and other interested persons who should be notified of the nominations. Include

the name, title, and mailing address of the chief elected official and mailing addresses of any other interested persons or agencies which should be notified, such as the planning commission, historical society, and chamber of commerce.

- 16. Research Notes. A copy of all source materials used in preparation of the nominations. Notes made from interviews must clearly identify the interviewer, the person(s) interviewed (with addresses), and the dates of the interviews. Excerpts from books and newspapers, copies of letters and notes, etc., shall be used to check the accuracy of the nominations text as needed, as well as placed on file at the Authority for future research and study.
- 17. Quarterly Progress Reports. Provide quarterly progress reports using the form provided by the Authority. Quarterly progress reports shall be due by January 15, April 15, July 15 and September 15 during of each year during the project reporting period and will include:
  - **a.** Title sheet identifying the project, contract number, and name and address of the selected contractor.
  - **b.** Names and titles/responsibilities of the project manager and persons working on the project, including any subcontractors.
  - **c.** A financial report of expenditures to date including any changes to approved budget or approved work schedule.
  - **d.** A written summary of progress outlining the work accomplished during the reporting period. Problems, real and anticipated, or any significant deviation from the agreed-upon work plan should be brought to the attention of the Contract Administrator.
- 18. Public Information Meeting. Hold one (1) public information meeting to acquaint the property owners, public officials, and general public with the Project Area, the nomination project and its results. The meeting, which should include a PowerPoint presentation, shall be conducted approximately 3-6 weeks prior to the presentation to the Review Board. The presentation will summarize the following: the project, the NRHP nomination process, an overview of the Project Areas' historic significance as set forth in the nominations, and an explanation of the benefits for the Project Area being listed in the NRHP. The selected contractor will also answer questions by the public about the project and the NRHP nominations and process. The meeting should be at least one (1) hour in length. The selected contractor shall coordinate with the primary contact for the City of Southfield on scheduling the meeting and logistics.
- **19.** Presentation to State Historic Preservation Review Board. Present the two NRHP nominations to the Review Board at its first regularly scheduled meeting held after the end of the nomination has be completed using the PowerPoint presentation prepared and submitted as part of Section IV, B, 12, c above.
- **20.** Project Completion Report. The selected contractor shall provide a brief professional quality report that includes the following:
  - **a.** A title sheet identifying the project, contract number, and name and address of the selected contractor;
  - **b.** The names and titles/responsibilities of the project manager and persons working on the project, including any subcontractors;

- **c.** The budget for the project; and
- d. A written narrative summary of the project and its outcome including an outline of the methodology used (as compared with that initially proposed), evaluation of the project results, and a summary of what worked and what the selected contractor would do differently the next time the selected contractor undertakes a project of this nature. Two copies of the final summary report shall be submitted to the Authority that includes 1) one printed copy and 2) one electronic version of the report in Microsoft Word. Verify with the Authority as to the acceptable version of Microsoft Word.
- 21. Credits and Disclaimers. Include on the cover or first inside sheet of the Project Completion Report and in any and all meeting signs, news releases, public announcements, or other written, audio, or visual material for this project (exclusive of the nomination products) the following credits/disclaimer that reads verbatim as follows:

The activity that is the subject of this project has been financed in part with Federal funds from the National Park Service, U. S. Department of the Interior, through the Michigan State Housing Development Authority. However, the contents and opinions herein do not necessarily reflect the views or policies of the Department of the Interior or the Michigan State Housing Development Authority, nor does the mention of trade names or commercial products herein constitute endorsement or recommendation by the Department of the Interior or the Michigan State Housing Development Authority.

This program receives Federal financial assistance for identification and protection of historic properties. Under Title VI of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973, and the Age Discrimination Act of 1975, as amended, the U. S. Department of the Interior prohibits discrimination on the basis of race, color, national origin, disability, or age in its federally assisted programs. Michigan law prohibits discrimination on the basis of religion, race color, national origin, age, sex, marital status, or disability. If you believe you have been discriminated against in any program, activity, or facility as described above, or if you desire further information, please write to:

Office of Equal Opportunity National Park Service 1849 C Street, NW Washington, DC 20240

**C. Deadlines for Completing Objectives.** All objectives, activities, and products must be completed within twenty-four (24) months from the date of contract execution. See Exhibit B – Proposal Submission for sample performance schedule.

# MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY REQUEST FOR PROPOSALS

#### **EXHIBIT A**

#### **NOTICE TO BIDDERS**

#### I. Bidder Qualifications/Requirements

Proposals not including requested information may be viewed by the Authority as non-responsive and not considered further. Bidders are strongly encouraged to review their proposals prior to submission to ensure that all requested information is included.

- **A. Bidder's Experience.** The Authority has identified the following qualifications that it believes are necessary for the successful performance and completion of the services described in the Scope of Work. The Bidder must:
  - 1. Have experience providing consulting services to undertake intensive level historic resource surveys documenting Mid-Century Modern Resources, and
  - **2.** Assign experienced personnel to perform the services or have personnel supervised by experienced staff.
- **B. Bidder's Authorized Signatory**. An official authorized to commit the Bidder to the terms and conditions of the proposal must sign the proposal being submitted. The Bidder must clearly identify the full title and authorization of the designated official and provide a statement of bid commitment with the accompanying signature of the official. Attach any resolutions authorizing the approved signatory with the proposal. Include the name and telephone number of person(s) in your organization authorized to expedite any proposed contract with the Authority.
- C. Bidder Organization Authorized to Transact Business in Michigan. The Bidder must be either a Michigan entity (limited partnership, Limited Liability Company, for-profit corporation or non-profit corporation, etc.) or, if foreign, authorized to do business in the State of Michigan.

## <u>Proposals from Sole Proprietors Will Not be Accepted</u>

Questions regarding specific requirements to transact business in the State of Michigan should be referred to or otherwise contact the Michigan Department of Licensing and Regulatory Affairs, Corporations, Securities & Commercial Licensing Bureau at:

http://www.michigan.gov/lara/0,4601,7-154-61343\_35413---,00.html.

**D. Bidder's Minimum Internet/Technological Capabilities.** The Bidder must have phone, internet, and e-mail access. Internet and e-mail access must be adequate enough to allow the Bidder to receive, download and upload data, files and attachments from Authority staff. (Current state standards are limited to a functional size of 20 MB).

E. Limits on Liability & Indemnification. The Bidder must review and acknowledge that the Authority will require the Bidder to satisfy the following requirements prior to the execution of a contract with the Authority. If the Bidder has objections, please provide an explanation with your proposal outlining the objection.

If awarded a contract, the Bidder agrees to:

- 1. Indemnify, defend and hold harmless the Authority, its Board, officers, employees and agents, from and against all losses, liabilities, penalties, fines, damages and claims (including taxes), and all related costs and expenses (including reasonable attorneys' fees and disbursements and costs of investigation, litigation, settlement, judgments, interest and penalties), arising from or in connection with any of the following:
  - a. any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents arising out of or resulting from (1) the services provided ("Services") or (2) performance of the Services, duties, responsibilities, actions or omissions of the Bidder or any of its subcontractors under an awarded contract.
  - b. any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents arising out of or resulting from a breach by the Bidder of any representation or warranty made by the Bidder in an awarded contract.
  - **c.** any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents arising out of or related to occurrences that the Bidder is required to insure against as provided for in an awarded contract.
  - d. any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents arising out of or resulting from the death or bodily injury of any person, or the damage, loss or destruction of any real or tangible personal property, in connection with the performance of services by the Bidder, by any of its subcontractors, by anyone directly or indirectly employed by any of them, or by anyone for whose acts any of them may be liable; provided, however, that this indemnification obligation shall not apply to the extent, if any, that such death, bodily injury or property damage is caused solely by the negligence or reckless or intentional wrongful conduct of the Authority.
  - **e.** any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents which results from an act or omission of the Bidder or any of its subcontractors in its or their capacity as an employer of a person.
  - f. any action or proceeding threatened or brought against the Authority to the extent that such action or proceeding is based on a claim that any piece of equipment, software, commodity or service supplied by the Bidder or its subcontractors, or the operation of such equipment, software, commodity or service, or the use or reproduction of any documentation provided with such equipment, software, commodity or service infringes any United

States or foreign patent, copyright, trade secret or other proprietary right of any person or entity, which right is enforceable under the laws of the United States.

- **F. Bidder's Insurance Coverage.** The Bidder must maintain and provide evidence, satisfactory to the Authority, of the following minimum insurance coverage:
  - **1.** General Liability Insurance for \$1,000,000 with the Authority shown as additional insured:
  - **2.** Errors and Omissions Insurance for \$1,000,000 for each occurrence and \$1,000,000 annual aggregate;
  - **3.** Worker's Compensation Insurance (if required under state law). Any citing of a policy of insurance must include a listing of the States where that policy's coverage is applicable.
  - **4.** If required by the Authority, Cyber Security Insurance for \$1,000,000.
- **G. Project Personnel**. Bids must acknowledge and identify project personnel who will be performing services pursuant to an awarded contract and (a) sign the contract on behalf of the selected contractor and/or (b) are listed in the form attached and incorporated into this RFP as Exhibit D.

#### II. Notifications to Bidders

- **A. Questions Regarding RFP.** Questions raised by Bidders concerning the RFP must be submitted in writing via either email or fax.
  - To ensure a fair and impartial process, the Authority's Procurement Office will only address those questions concerning the RFP submitted in writing via email or fax.
  - Phone calls involving the RFP or related questions will not be accepted.
  - Firms submitting bids shall not contact any Board members or Authority staff.
  - Submit questions using the subject line **Southfield RFP** to the attention of:

E-mail: MSHDA-Procurement@michigan.gov Fax: (517) 335-0125

- Address all questions regarding the RFP to the Authority's Procurement Office.
- Questions must be received in writing by December 15, 2016 at 4 p.m. Detroit, Michigan time.
- Responses to properly submitted questions will be posted by December
  20, 2016 at 4 p.m. Detroit, Michigan time.

- The Authority will hold no other question sessions or bidder's conferences.
- All questions and answers related to this RFP will be supplied to Bidders providing the Procurement Office with notification of intent to submit a proposal.
- **B.** Revisions to RFP. If, prior to the proposal deadline, the Authority deems it necessary to provide additional clarifying information, or to revise any part of the RFP, supplements or revisions will be provided to all Bidders who have indicated they will submit a proposal. Proposals will then be evaluated based on the terms and conditions of the RFP, any supplements or revisions to the RFP, and the answers to any written questions.
- C. Michigan Freedom of Information Act. All documents submitted to the Authority are subject to the Michigan Freedom of Information Act ("FOIA"). In the event a request for submitted documents is made to the Authority, the Authority's FOIA Coordinator will redact or withhold information and/or documents that are exempt from disclosure under FOIA. See MCL 15.243 et seq. Please note that any requests by non-MSHDA personnel to review proposals will be denied until the deadline for submission of the bids has expired. See MCL 15.243(1)(i).

#### Please submit FOIA requests to the Authority as follows:

MSHDA FOIA Coordinator c/o Legal Affairs 735 E. Michigan Avenue Lansing, MI 48912

D. Payments to Pensioned Retirees. 2007 PA 95, MCL 38.68c requires retirees of the State Employees Retirement System ("Pensioned Retirees") who become employed by the State either directly or indirectly through a contractual arrangement with another party on or after October 1, 2007 to forfeit their respective state pensions for the duration of their reemployment. Accordingly, any pensioned retiree who provides or renders services pursuant to the contract for which bids will be made under this RFP shall be required to forfeit his or her pension during the term of the contract.

Proposals must acknowledge and confirm whether pensioned retirees will render services under the contract being sought through this RFP. If the Bidder intends to use a pensioned retiree, the Bidder must submit written confirmation from the pensioned retiree that he or she agrees to forfeit his or her pension during the term of the contract, if awarded. If awarded a contract, the Bidder must submit a copy of the pensioned retiree's directions to the State of Michigan's Office of Retirement Services ("ORS") to withhold the retiree's pension payments until the end of the contract term by having the pensioned retiree complete a Retiree Rehire Certificate. A copy of the Retiree Rehire Certificate will be required to be submitted prior to executing an awarded contract.

**E. Contract Award Approvals.** Prior to executing an awarded contract, the Authority must seek and obtain Michigan Civil Service approval. The required forms will be submitted to Civil Service prior to the Authority's Board approval.

Contracts that equal or exceed \$45,000 must be approved by the Authority's Board. Thereafter, an awarded contract will be forwarded to the selected Bidder with instructions to review, sign, and return two "originals". Upon receiving the signed "originals", the Authority's Procurement Office will submit the signed "originals" to a duly authorized signatory for final execution on behalf of the Authority. One fully executed "original" will then be returned to the selected contractor.

- **F. Applicable Laws.** The selected contractor will be required to comply with all Michigan and federal laws, as well as acquire any permits or permission-related documents to provide services being sought.
- **G.** Submissions Subsequent to Award. As part of an awarded contract, the selected contractor will be required to review and provide and/or acknowledge additional documents including but not limited to:
  - Certifications Regarding Debarment, Suspension and Other Responsibility Matters form.
  - W-9 Request for Taxpayer Identification Number and Certification.
  - Retiree Rehire Certificate.

# MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY REQUEST FOR PROPOSAL

#### **EXHIBIT B**

#### PROPOSAL SUBMISSION

## I. <u>Submitting Proposal</u>

- Bidders wishing to submit proposals must submit an electronic copy of a proposal to provide the services described in the Scope of Work.
- Bidders must outline their proposed solutions to meet the tasks, activities, listed requirements, and any questions outlined in the Scope of Work of this RFP, as well as its attached and incorporated exhibits. Additionally, proposed solutions must include both State Roles and Responsibilities and Contractor Roles and Responsibilities.
- The due date for the Authority's receipt of the proposals responding to this RFP is **January 12, 2017 at 4 p.m. Detroit, Michigan time**.
- The Authority shall not be liable for any costs that a Bidder may incur while preparing a proposal.
- The Authority shall not be liable for any costs that a Bidder may incur prior to the complete execution of a contract.
- If the Authority enters into a contract, the Authority's consideration (payment) shall be limited to the term of the contract.

## II. Proposal Delivery

- **A. Due Date.** Proposals responding to this RFP are due **January 12, 2017** at 4 p.m., Detroit, Michigan time.
- **B. Originals and Copies.** Submit one proposal in electronic format via email or fax outlining how the Bidder will provide the services described in the Scope of Work.
- **C. Delivery of Proposal.** Direct all deliveries to:

## MSHDA-Procurement@michigan.gov

Confirmation of Delivery. MSHDA-Procurement will verify receipt and time of receipt to the Bidder within 24 hours. If a bidder has not received verification, the bidder should verify the email address provided above (i.e., no spaces; hyphen between "MSHDA" and "Procurement" and resubmit with a cover email.

**D. Commencement of Work.** Project work shall not commence until execution of a project contract. The selected contractor shall not proceed with performance of the project work or incurring of project costs until both parties have signed the project contract to show acceptance of its terms and conditions.

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- **E. Project Control.** The selected contractor will carry out this project under the direction and control of the Authority and its designated Contract Administrator.
- **F. Quarterly Progress Reports.** The selected contractor may be required to submit brief written quarterly summaries of progress outlining the work accomplished during the reporting period. Problems, real and anticipated, or any significant deviation from the agreed-upon work plan should be brought to the attention of the Contract Administrator. A financial report of expenditures to date including any changes to approved budget or approved work schedule must be submitted as part of the report. If required, these reports will be due to the Authority each January 15, April 15, July 15 and September 15 during the project period.
- G. Final Project Summary Report. The selected contractor may be required to submit a narrative summary of the project and its outcome. This should include an outline of the methodology used, evaluation of the project results, and a summary of what worked and what the selected contractor would do differently the next time the contractor undertakes a project of this nature. If required, one printed copy of the final summary report and an electronic version of the report in shall be submitted to the Authority.

## III. Selection of Proposal

The selection of a proposal shall be subject to a review by the Authority's Legal Affairs Division concerning conflicts of interest and/or participation in Authority programs by the Bidder, its officers, employees, subcontractors or independent contractors.

**A. Selection Criteria.** The Authority will select the proposal based on Selection Criteria listed below:

| 1. | Experience, education or certification  | (40 Points) |
|----|---|-------------|
| 2. | Communication skills, including clarity of proposal and writing sample              | (15 Points) |
| 3. | Adequacy of proposed methodology, staffing, and time frames for performing services | (25 Points) |
| 4. | Reasonableness and feasibility of fee   | (10 Points) |
| 5. | Experience documenting Mid-Century Modern Resources                                 | (10 Points) |

**Total Possible Points:** 

- **B. Proposal Selection.** The Authority's review may take up to four weeks after the closing date for submitting proposals. The Authority anticipates notifying the selected contractor on or about February 22, 2017 via e-mail and posting on the Authority's website; however, the selection and final notice of award will be contingent on approval by the Michigan Civil Service Commission and the Authority's Board.
- **C.** Cancellation of Selected Proposal. The selection of a proposal by the Authority may be cancelled at any time prior to the complete execution of a contract. If the Authority

100 Points

cancels its selection of a proposal, the Authority may repost this or a similar RFP and re-seek proposals. Reasons for canceling the selected proposal may include, but are not limited to, the following:

- 1. Refusal of Department of Civil Service to process required forms.
- 2. Refusal of duly authorized Authority signatory to execute the contract.

# MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY REQUEST FOR PROPOSAL

#### **EXHIBIT C**

#### PROPOSAL FORMAT

## I. Overview

- Proposals must be submitted in the format described in this Exhibit C as outlined below.
- There should be no attachments, enclosures or exhibits other than those considered by the Bidder to be essential to a complete understanding of the proposal.
- Each section must be clearly identified with appropriate headings and/or table of contents.
- The proposal should be clear, accurate, and complete, with sufficient detail to enable the Authority to evaluate how the Bidder proposes to provide services and methods described in the RFP.

#### II. Headers/Table of Contents

- **A. Business Organization.** Include the following information and supporting documentation:
  - 1. The full name and address of Bidder, including any "Doing Business As" titles.
  - 2. The branch office or name and address of registered agent, if applicable.
  - **3.** The type of entity (e.g., Michigan corporation, Michigan nonprofit corporation, Michigan limited liability company, foreign). Note that the selected contractor will be required to provide proof of authorization to conduct business in the State of Michigan.
- **B. Management and Personnel.** Answer/Address the following:
  - 1. Officer and Management Summary. Identify managers and/or officers who will manage the contract if it is awarded and provide their resumes or CVs. Identify officers and managers by name and position. List their responsibilities and the specific tasks each officer and manager assigned to the project will carry out and the anticipated time frames for each task. Provide current contact information including the manager(s) and/or officer(s) name, title, mailing address, email address, and phone and fax numbers.
  - Personnel Summary. Identify proposed key project personnel, including job titles, responsible for performing the activities and services described in the Scope of Work.

## C. Experience.

- 1. Prior Experience of Bidder. Indicate prior experience of your organization that you consider relevant to the successful accomplishment of the project described in this RFP. Include sufficient detail to demonstrate the relevance of such experience. Include descriptions of qualifying experience, including project descriptions, costs, and starting and ending dates of projects successfully completed. Also include the name, address, and telephone number of the responsible official of the client organization who may be contacted.
- 2. Experience of Proposed Personnel Assigned to Provide Services. The proposal should describe the education and experience of the personnel who will be assigned to provide the proposed services, including managers who may oversee work of personnel.
- **3. Examples of Work.** The following examples of recent work should be submitted with the application:
  - **a.** A writing sample. Prefer that the sample is from a NRHP nomination form, an intensive level historic resource survey, or other preservation related document.
  - **b.** Two sample photographs. Prefer that the sample is from a NRHP nomination form, an intensive level historic resource survey, or other preservation related document.
- 4. Confirm Whether Any Assigned Personnel Receive Pension Payments from the State of Michigan. If any assigned personnel receive pensions from the State of Michigan, you must provide confirmation, signed by each assigned person with a State of Michigan pension, that he or she acknowledges and agrees that he or she must forfeit any pension payments made during the term of the contract. If a contract is awarded, each assigned person with a State of Michigan pension must submit a copy of the pensioned retiree's directions to the State of Michigan's Office of Retirement Services to withhold the retiree's pension payments during the contract term.
- **5. Professional References.** Include professional references who can provide information regarding the Bidder's prior past performance.
- **6. Additional Information and Comments.** Include any other information that is believed to be pertinent but not specifically asked for elsewhere.

#### D. Proposed Services.

- How Services Will be Rendered. Address and describe the process used to render the services and how the services will be rendered. This should be an overview of the methodology to be used, based on staff and time frames, to meet the project scope of work and complete the required services within the time frame of the project.
- 2. Use of Subcontractors. If any work will be subcontracted, describe the following:
  - a. Work that will be subcontracted.

- **b.** The process used to select the subcontractors.
- **c.** The subcontractor's experience and expertise.
- **d.** The names of the firms/individual(s) who will perform the subcontracted work.
- e. How quality of service will be monitored and ensured.
- 3. Standards. Describe or address the following:
  - **a.** The consultant in charge must meet the National Park Service 36 CFR 61 qualifications for history, architectural history or architecture. See <a href="https://www.nps.gov/history/local-law/arch\_stnds\_9.htm">https://www.nps.gov/history/local-law/arch\_stnds\_9.htm</a>.
  - **b.** All work must be done in accordance with the U.S. Secretary of the Interior Standards and Guidelines for Archaeology and Historic Preservation for Identification, Evaluation, and Registration and the SHPO's Manual for Historic and Architectural Surveys in Michigan.
- **4. Security of Data.** If the services to be rendered require the collection and/or use of confidential and/or personal data, confirm the following:
  - a. Has your organization established and used a policy to address the security of paper and electronic data? (Please do not submit a copy of your security policy.)
  - b. Does your policy address the removal of confidential and/or personal data from storage media? (For example, does your firm's policy include the removal or "wiping" of data from hard drives when a computer is no longer used?)
- **5. Copyrighted Materials & Intellectual Property.** Acknowledge and/or confirm the following:
  - **a.** You agree that any and all products produced as a result of this contract shall be the property of the Authority.
  - **b.** You agree that the Authority shall (a) hold a copyright on all materials or products produced under the contract and (b) be allowed to file for a copyright with the United States Copyright Office.
  - **c.** You acknowledge that submitted documents will not contain in part or whole copyrighted materials.

## E. Price Proposal & Budget

1. Price Proposal. All rates quoted in proposals submitted in response to this RFP will be a firm fixed price for the duration of the contract. No price changes will be permitted. (Note that proposals should reflect per diem rates in effect at the time of proposal submission. State per diem rates are subject to change during the term of an awarded contract.).

- 2. Budget. Include in the proposal a line item budget identifying all expenses related to the work to be performed. By submitting the bid, the Bidder acknowledges that it bears the risk that its expenses may exceed the proposed amount. The budget should include applicable items, which may include the following:
  - **a.** Staff costs (# of hours/per hour rate, etc.).
  - **b.** Costs of supplies and materials.
  - **c.** Other direct costs.
  - **d.** Transportation costs.
  - **e.** Total budget.
- **F. Schedule/Timeline.** Bids must include a schedule for delivery of services set forth in the Scope of Work and cite the proposed deadlines for completing the tasks within the Scope of Work. All work must be completed within twelve months from contract signing.

Include a timetable indicating how the project will be scheduled. The timetable should include: (1) any proposed meetings; (2) dates for draft submittals; (3) review times (allow 4 weeks for Authority review) and completion dates for deliverables; (4) quarterly reports (these will be due July 15, Sept. 15, Jan. 15, and April 15 each year during the project reporting period); and (5) final Project Completion Report. A proposed schedule/timeline is listed below:

| Completed<br>Service/Project<br>Components                                       | Estimated Completion Dates                 |
|--|--|
| (Using Scope of Work, Bidder should insert tasks and activities to be completed) | (Bidder should insert estimated deadlines) |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

- G. Disclosure of Participation and Interests in Authority Programs.
  - 1. **Disclosure of Interests in Authority Programs.** Authority programs include, but are not limited to, the Housing Voucher Program, any loans where the Authority is the lender, and any grants made by or administered by the Authority.

- 2. Submission of Conflicts of Interests. Submit a list of all interests that the Bidder, its officers, board members, and employees respectively have in Authority programs. If the Bidder intends to use independent contractors or subcontractors to render services, include the interests that independent contractors or subcontractors and their officers, board members, and employees respectively have in Authority programs.
- 3. Potential Conflicts of Interests. Indicate in the proposal whether the Bidder is currently under contract and/or has been awarded a grant from the Authority. Please confirm whether any potential conflict of interest will exist if the Authority enters into a contract with the Bidder.

Potential conflicts of interest may arise from the Bidder's officers, employees, members, board members, independent contractors or subcontractors the Bidder will use to render services if the firm enters into a contract with the Authority.

If the Bidder is currently under contract or is receiving a grant from the Authority, indicate if the Bidder or project personnel holds a position with another entity that may be under contract or receiving a grant from the Authority.

Include an organizational chart from each entity under contract or awarded a grant from the Authority in which the Bidder or project personnel holds a position. Include each employee's position and title within the entity. In addition, indicate whether the Bidder or the project personnel is responsible for making financial decisions in his/her capacity and what measures have been implemented to ensure that funds are not comingled.

- **4. Family Members Who Work for Authority.** Please list the names of the Bidder's officers, board members, and employees who have family members who work for the Authority and the names of the family members who work for the Authority.
- **H.** Signature Clause to be Signed by Bidder's Authorized Signatory. Insert into the proposal and have the authorized signatory sign the following signature clause at the end of the proposal:

| I confirm that I have submitted this proposal on be response to the Michigan State Housing Development of Proposals for Southfield NRHP Nomination. |   |
|---|---|
| I also confirm that I have read and under indemnification, copyright, data security and insura  | _ |
| Ву:   | - |
| lts:  | • |
| Date:   |   |



# MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY REQUEST FOR PROPOSAL

## **EXHIBIT D**

## **PROJECT PERSONNEL**

See appended document titled

CERTIFICATE VERIFYING PROJECT PERSONNEL

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# CERTIFICATE VERIFYING PROJECT PERSONNEL OF THE CONTRACTOR/SUBCONTRACTOR

The Contractor/Subcontractor acknowledges that the following personnel are Project Personnel of the Contractor/Subcontractor:

| (1)      | Name  |           |
|----------|---|-----------|
| ,        | Name(Print or type name above line)   |           |
|          | Title with Contractor/Subcontractor   |           |
|          | s person a retiree who receives a pension from the Michigan State<br>ement System? Yes/No | Employees |
| (2)      | Name(Print or type name above line)   |           |
|          | Title with Contractor/Subcontractor   |           |
|          | e person a retiree who receives a pension from the Michigan State ement System? Yes/No    | Employees |
| (3)      | Name(Print or type name above line)   |           |
|          | Title with Contractor/Subcontractor   |           |
|          | e person a retiree who receives a pension from the Michigan State<br>ement System? Yes/No | Employees |
| Name     | of Signatory for Contractor/Subcontractor:  |           |
| Printed  | d Name:   |           |
|          | (Print or type name above line)   |           |
| Its:     |   |           |
| Signat   | ture:   |           |
| Federa   | al Identification Number:   |           |
| Pensione | ed Retirees (2007, MCL 38.68) (12/7/07 Rev)   |           |